DOCUMENT RESUME

ED 257 430 IR 011 617

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TITLE Self-Directed Learning and Distance Education. Can Distance Education Be a Good Alternative for the Self-Directed Learners? Uppsala Reports on Education 21.
INSTITUTION Uppsala Univ. (Sweden). Dept. of Education.
REPORT NO ISBN-91-85250-98-8
PUB DATE Dec 84
NOTE 25p.
PUB TYPE Information Analyses (070) -- Viewpoints (120)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS *Adult Education; Adult Learning; Discovery Learning; *Distance Education; Educational Research; Experiential Learning; Foreign Countries; *Independent Study; *Learning Processes; *Learning Strategies; Position Papers; Student Projects
IDENTIFIERS Sweden

ABSTRACT

Acknowledging a recent increased interest in research about self-directed learning, this report analyzes and discusses two different forms of education: self-directed learning and distance education. Here, self-directed learning is identical with autodidactic learning, a form of education that cannot be included in organized adult education; the learner has the whole responsibility for his/her education or learning-project. Distance education is a method used by educational institutions for adult education, which implies that the educational organization has responsibility for the education. This report reviews research about self-directed learning and proposes a deeper analysis of the phenomena of learning, self-concept, and experience, where the student is put into a context that can be examined by educators. Also discussed are self-directed learning and distance education, proposals from a distance educationalist, and current thought on self-directed learning. It is concluded that there seem to be so many differences in motivations for study, learning strategies, and the study process between self-directed learners and organized adult learners, that educators must be very careful when trying to find new ways of reaching self-directed learners. An extensive reference list and a list of Uppsala Reports on Education are included. (THC)

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ISBN 91-85250-98-8
ISSN 0348-3649

Uppsala universitet
Reprocentralen HSC
Uppsala 1965

SUMMARY

An increased interest in research about self-directed learning has been noticed during the last few years among distance educators. Self-directed learning is identical with autodidactic learning, a form of education which cannot be included in organized adult education. An important characteristic of self-directed learning is that the learner has the whole responsibility for his/her education or learning-project.

The report introduces research about self-directed learning and refers these to Moore's discussion in the report "Self-directed learning and distance education", in which Moore states that distance education is a good alternative for self-directed learners. But Moore's arguments for his statement are both too diffuse and too general and are built on too little information about the facts of self-directed learning. There must be a deeper analysis of the phenomena of learning, self-concept and experience where the student is put into a context, which can be examined by educationalists. The author points out that a good and fruitful alternative can be to turn our attention to an analysis which tries to explore how today's knowledge about self-directed learning can help us to develop distance education in a useful direction both for the students and the organizations. There should be very good possibilities of using self-directed learning to get valid and reliable knowledge about the learner's own methods of planning their learning, the learning-process and the outcomes. There is also a fruitful possibility of studying the concept of experience in learning, as the self-directed learner's strategy for the learning project is based on their own level of experience. It is therefore important to find out, both in distance education and adult education in general, how people want to organize and control their learning activities and how important human contact is in the learning process.

Uppsala December 1984

Birgitta Willén

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1 SELF-DIRECTED LEARNING AND DISTANCE EDUCATION

An increased interest in research about self-directed learning has been noticed during the last few years and this interest has been strong among distance educators (eg Waniewicz 1978, Coldeway 1982, and Moore 1983).

In this report two different forms of education will be analysed and discussed: self-directed learning and distance education. Self-directed learning is here identical with autodidactic learning, a form of education which cannot be included in organized adult education. An important characteristic of self-directed learning is that the learner has the whole responsibility for his/her education or learning-project.

Distance education is a method used by educational organizations for adult education, which, compared to self-directed learning, implies that the educational organization has great responsibility for the education. The educational organization, which can be small or large, plans and organizes the education and is able to control both the content and the method.

As we will see the concept independent learning is used in the research, theory and practice of both these two different forms of education. But as Brookfield (1980, 1982) has said: "In general, these two strands of research and theory have developed in isolation" (1982, p. 26), and the practical and theoretical differences between them are in many ways important.

2 DISTANCE EDUCATION

In English, there is a plethora of terms for distance education, eg correspondence study, home study, independent study and external studies. The existence of several definitions is probably due to the fact that the concept comprises a number of varying study forms, especially when seen from an international perspective. The most noticeable differences are in the way organizational problems are solved and the choice of media.

Keegan (1980) has analysed four different definitions of distance education and has presented what he considers to be the main elements of distance education, namely:

- "the separation of teacher and learner which distinguishes it from face-to-face lecturing
- the influence of an educational organisation which distinguishes it from private study
- the use of technical media, usually print, to unite teacher and learner and carry the educational content
- the provision of two-way communication so that the student may benefit from or even initiate dialogue
- the possibility of occasional meetings for both didactic and socialisation purposes
- the participation in an industrialised form of education which, if accepted, contains the genus of radical separation of distance education from other forms" (ibid p. 33).

Most distance education programmes can be said to belong to the area of recurrent or adult education. Looking at distance education from an international perspective, the concept is found to exist in many forms, the common denominator being that student and teacher are separated by space. The methods of overcoming this space are numerous. In the majority of cases, the written word, i.e. books and compendiums, dominate. During the 1970's, the use of technical aids blossomed, but even now a downward trend in their usage can be seen, probably because of the high costs they incur, but in some cases because the method did not live up to expectations.

3 SELF-DIRECTED LEARNING

What we generally call autodidactic learning has in research a lot of different names, as self-directed learning, self-initiated learning, self-planned learning, informal adult education, non institutional learning and independent learning. A common characteristic is that the person is learning outside the established and organized adult educational system.

During the 1960's Johnstone and Rivera (1965) found in a national survey in the USA that self-directed learning was much greater than they had anticipated. They assumed that this type of learning was the greatest part in the field of adult education. This assumption was confirmed by research made by Tough (1967, 1968, 1971, 1978). Let us look at Tough's definition of self-directed learning, as his definition has been used in most studies in this area. According to Tough self-directed learning "refers to a person's deliberate attempt to learn some specific knowledge and skill if (a) he spent at least eight hours doing so during the year prior to the interview and (b) he himself, rather than any professional teacher or organized group, assumed the primary responsibility for planning, controlling and supervising the entire project" (Tough 1967, p 4). In this definition all sorts of learning projects can be included and any method can be reckoned. When using this definition Tough (1978) has shown that around 90 per cent of adults conduct at least one major learning effort during a year.

In summing up research results Tough (1978) found that "the typical learner conducts five quite distinct learning projects in one year. He or she learns five distinct areas of knowledge and skill. The person spends an average of 100 hours per learning effort - a total of 500 hours per year. This is almost 10 hours per week" (ibid p 252). Looking to the total of the learning projects of adults Tough found that almost three fourths are completely self-directed, 14 per cent group-learning and 10 per cent one-to-one learning situations. He also points out that only 20 per cent of the learning projects are planned and organized by professional educators. Through other studies we also know that participation in self-directed learning seems to be almost universal (Coolican 1974, Penland 1977, Brookfield 1981, 1982).

According to Tough (1978) the motive mentioned most by self-directed learners is some anticipated use or application of the knowledge and skill. The person has a task which he/she wants to perform successfully. It is seldom curiosity, puzzlement or knowledge for its own sake. In self-directed learning the possible range of subject matters seems to be infinite and we have some information about these subject areas. Coolican (1974) states that the most popular learning projects dealt with vocational subjects, home and family, hobbies and recreation. Penland (1977) has classified the learning projects into three main subject groups, formal, practical and intraself topics, where the practical topics are the most usual for this group of learners. The reason for learning something in a self-directed way seems to be the desire to set one's own learning pace and also to have one's own learning style (McCatty 1975, Penland 1979 a,b).

It is important that most of the reasons given for studying in this way have something to do with the person's own way of learning. According to Penland (1979 a,b), the self-directed learners do not often mention negative feelings against the formal educational system, but it cannot be denied that such feelings are there. Penland also shows that most of these learners prefer to do their learning at home.

There is seldom information about the self-directed learners' educational background, but a trend is that it is more frequent among people with a lower educational background. The opposite is found in organized adult education, so such a result could be due to the negative feelings towards organized education by the less well educated.

It is difficult to find out valuable information about the self-directed learners' study-process and learning-style, but there is some knowledge which we can use. In these learning projects the learner himself is responsible for the whole process and organizes it without any help from any educationalist or educational organisation. Morris (1977) has looked at the different steps in the learners' planning and he found that the first step was usually to clarify a general problem or issue. Then the learner decided whether or not to begin the learning project. After this, the learner identified resources. Penland (1977) found personal variations in the planning steps among self-directed learners. Some of the investigated groups at the first step discussed their interest with

other people and some looked for useful information to be able to organize the learning project. The self-directed learner has a lot of personal contacts in his learning activities. Elsey (1974) and Brookfield (1981, 1982) have shown that many of these learners are members of enthusiasts' societies or hobby clubs and very often a person belongs to more than one such club or society. The most frequently mentioned benefit from membership was the exchange of information between the individual members. Voluntary organisations are, according to these results, very involved in self-directed learning. Elsey (1974) also points out that a lot of people mentioned that the reason for participating in a voluntary organisation was to learn something new. Peer groups and friends, in general, seem to be important resources for self-directed learners. Farquharssons (1975) says: "They were effective not only in helping the person deal with the problem (such as drinking, gambling, weight, physical handicap, bereavement, child raising), but also in improving self-confidence and the ability to relate to other people effectively and helpfully" (ibid p 257). Self-directed learners also often mention that they have a lot of contacts with people in the place where they live. They were often asked to help other people with things which were related to their learning project (see Brookfield 1979).

One usual motive of taking part in organized adult education is to form social relationships, to make new friends or to escape loneliness or boredom (Houle 1961, Morstain & Smart 1974) whereas this motive is not found in self-directed learning. Self-directed learners seem rather to be strongly goal-oriented in their learning projects.

The most important resources for self-directed learners are firstly human resources and, next books and pamphlets (Tough 1967, Penland 1979 a). Coolican (1974) also found the same and reports that the most used methods are practice, reading and discussion. One general characteristic of the self-directed learners seems to be that they use active methods in their learning. Penland (1979 a,b) also points out an interesting difference between learners and non-learners. When these two groups were asked how they valued important information resources the non-learners, contrary to the people engaged in learning activities, rated television and radio considerably higher than books (see also Penland 1976).

The attitudes of self-directed learners toward learning must be an im-

portant consideration, when we are discussing whether there is some connection between them and the established educational system. In Brookfield's work (1981, 1982) three distinct attitudes towards learning were exhibited by self-directed learners. They believed that their activities represented the gradual exploration of a limitless field of knowledge. Most of the persons Brookfield interviewed were unable or unwilling to specify an end point to their studies. Secondly they had a great breadth of interest, there were always unfamiliar areas to investigate and new skills to acquire. Thirdly they felt they were part of a fellowship of learning, so that they could identify themselves as belonging to a larger learning community. "They felt themselves to be part of a group of like-minded individuals who were prepared to share the fruits of their knowledge and their range of accumulated experience for the benefit of all" (Brookfield 1981, p 21).

Brookfield (1981, 1982) has compared Open University/correspondence students with self-directed learners (Brookfield uses here the concept independent learner) and there were marked differences between these two groups regarding the origins of their learning activities. The self-directed learners had very often started the learning project as a result of influence by some important person, such as parents, spouse or peers. The correspondence students often mentioned the desire for intellectual stimulus and the affirmation of self-esteem as reasons for beginning learning.

In the area of learning strategy and study-process Brookfield found that the self-directed learners almost had no problems in their learning activities. "There was evidence to show that the kinds of difficulties a researcher might label as 'problems' were regarded as enjoyable challenges, or interesting diversions, by the independent learners themselves" (Brookfield 1982, p 29). In contrast to this, Brookfield could identify seven broad categories of difficulties experiences by correspondence students, most of which concerned the intellectual and temporal demands of study by correspondence; trying to make sense of multidisciplinary perspectives in course-materials, dealing with an intimidating workload in the face of inadequate study time, developing required presentational skills, difficulties of working in isolation, arresting fatigue and declining motivation, and the setting of anxieties and uncertainties regarding their learning abilities and post-study

opportunities. Similar results about correspondence/distance students have been published over a long period and there have been proposals and experimental activities to find out better methods in distance education to help the distance students to continue their studies. It was mentioned above that self-directed learners seem to have a great deal of support from clubs/societies and among friends. One of the important problems of distance students has always been their feeling of isolation from fellow-students and the educational organisation.

4 PROPOSALS FROM A DISTANCE EDUCATIONALIST

Here I have chosen to present Moore's (1983) thoughts about how distance education, as a method, can be used for self-directed learners. Moore means that self-directed learners are the same as autonomous learners. The concept of the independent and autonomous learner has frequently been used in the debate about the flexibility of distance education. According to Moore (1972, 1973, 1975, 1977), independent learning and teaching is an educational system in which the learner is autonomous and separated from his teacher by space and time, so that communication is by print, electronic means, or some other non-human medium. The autonomous learner is described as a person who knows how to proceed through each of the learning events. But according to Moore, the independent or autonomous learner is a person engaged in organized education, often distance education and this concept is separated from the concept of self-directed learning.

Moore (1983) starts his discussion of self-directed learning and distance education with the concept of learning-in-education. Educationalists are concerned with learning with a deliberate goal, which does not exclude self-directed learning. Moore takes his starting-point from educationalists and contrasts unconscious and planned learning. As examples of unconscious learning he mentions: "how we learn to stop at a red light, how to behave in a shop in a foreign city, or how to find one's way around the city by bus" (ibid p 1), and he also points out that "such everyday, casual and random learning is studied by the psychologists" (ibid p 1). Moore's opinion is that the educationalist's domain is not primarily to understand how learning occurs: "Though of course such knowledge is helpful - but our primary interest is in making it happen, in improving it, in planning for it, in helping it to happen" (ibid p 1). The key for Moore is therefore intent and planning and that there must be a deliberate goal for the learning.

Another reason for Moore accepting that self-directed learners and autonomous learners are one and the same is because adults have "a self-concept of independence" (ibid p 7). Therefore, Moore warns the educators not to abuse the independence of self-directed learners, nor other groups of adult learners; their dependence on the educators must not be reinforced. According to Moore it is often the case that teachers do not want students to be independent.

Let me here penetrate these two statements by Moore, which form the base for his proposal to engage distance educationalists in the area of self-directed learning. Moore's conception of learning is very general: "Of course there is no one theory generally accepted, but there is a generally accepted classification of the main theories into those which view learning as a mechanistic process at response to externally included stimuli; as a reorganisation of cognitive structures; as adjustment of the person in his environemnt, and as the development of social relationships. In their different ways theories of all these types explain how we learn - i.e. how our perceptions and behaviour change as a result of experience" (ibib p 1).

From my point of view it is impossible to use such a general concept of theory of learning. It is so general that it is of almost no interest in a specific learning situation. The learning must be put into its specific context before we, as educationalists, can start to plan our work. We know that there is a large variation in students' ability to cope with study materials (see eg Marton & Wi'l'n 1972) and also "that there are distinctive differences between people in terms of their subjective conceptions of learning" (Säljö 1979, p 443, see also Marton 1979, Marton & Svensson 1982, Säljö 1975, 1982). Moore's way of handling the concept of learning can also include the possibility of disinterest on the part of the learner, which seems to be a common view among educationalists.

Moore also makes a distinction between learning as studied by educationalists and learning as studied by psychologists, the latter being based only on the intention of learning. Learning as a general phenomenon must be the same in both these disciplines and its nature and significance must be the same. But, of course, the tradition of, for example, research methodology in learning is different in these two disciplines as is in what way the research results are used in practice. But don't let this lead us, as educationalists, to think that we don't need to have knowledge about learning. It is for us, as educationalists, very easy to see that the planning of education and teaching is or ought to be based on real knowledge about the students' learning process. And let me again point out that we are not helped by general theories about learning; learning must be described in a context to be of any value.

The other statement from Moore is his conception that adults have a self-concept of independence, "In most aspects of their everyday lives they believe themselves capable of self-direction and they are generally capable and willing to be self-directed in their learning also" (ibid p 7). This statement is as general as his statement about learning and is also therefore not useful. The self-concept among adults cannot be described in a general way, it must be related to both individuals or groups of adults, to specific situations and to certain learning tasks.

Self-concept in relation to education has been investigated during the last decade and there are a lot of studies, which show that there are great differences among adults (see eg Willén 1981). A lot of adults seem to have very weak self-concept in relation to organized education (Johansson & Ekerwald 1976, Brookfield 1978). Moore also warns educationalists not to abuse the independence of self-directed learners, nor other groups of adult learners: their dependence on educationalists must not be strengthened. According to Moore it is common for teachers not to want students to be independent and he explains it is this way: "Perhaps we secretly, or unconsciously enjoy the status of parent which such dependence gives us" (ibid p 9). In this connection I find it most interesting that the notions of human contact in learning is excluded. In a lot of studies in adult education (Tough 1967, Tsey 1974, Cross 1981, Willén 1981, 1983, 1984 a,b, Brookfield 1982) we can see, that the learners point out that there is a strong need for human contact in the learning situation. Further, we have results that show us that even this need varies between individuals and at different times (Willén 1981, 1984).

Another variable that is very important, when studying adult education, is the concept of experience. In organized adult education we know that the students' prior experience is of great importance for the whole study process, and in organized courses for adults we as planners and teachers often have problems due to students starting courses with very different experiences (Dahllöf & Willén 1978). The role of experience is therefore extremely interesting in self-directed learning, as the learners' strategy is based on the learners' own experience.

The adults' experience will influence their thinking and understanding

and it is therefore important in adult education. As Svensson (1984) stresses "Phenomena of thinking apparently have to be regarded as involving previous experience and knowledge and the organizing of content where the principle of organization, the form, is considered as a part of the whole reasoning" (ibid. p 34).

5 DISCUSSION

Moore's conclusion is that self-directed learning fits in very well in distance education. At the same time as Moore (1983) argues in favour of distance education for self-directed learners, he warns us against some of those who work in distance education organizations: "Distance teaching has become successful, and I see attracted to its management many people of a different kind. They are people who are more motivated by self-advancement than by a sense of service to others. They put themselves, their organization and the machine before the learner, if they think of the learner as a person at all. These are people who a decade ago would have made their careers in business, or government, or perhaps in the administration of a 'respectable' area of education. They are a formidable and threatening new breed and we must be alert to defend against them those human values we believe in - especially the value of learner freedom, individualism and self-direction" (ibid p 27).

Moore's arguments for his statements are both diffuse and too general and are built on too little information about the facts of self-directed learning. There must be a deeper analysis of the phenomena of learning, self-concept and experience and this will lead to a situation where [illegible] is put into a context, which can be examined by educational [illegible]. It is obvious, however, that it is extremely important and necessary for the future of distance education to look seriously at research outside its own immidiate area and therefore a report like Moore's is useful.

There is a growing amount of information about the self-directed learner, but most of it is still on a very general level, which means that it can be difficult and dangerous to use it for planning new educational activities.

There are a lot of differences between self-directed learning and distance education. One of the most important is the role of the learner. Distance education is always planned, organized and controlled by an educational organization. The goal, the content, the methods, etc, for the distance course are decided by the educational organization and these are very often based on political decisions. The political

goals and aims of education cannot be transferred directly to self-directed learning activities. In self-directed learning the learner sets his/her own goals and learning pace and uses his/her own way of learning. The learner has full control over the learning situation. Secondly, a great part of distance education is so-called formal education, based on an official credit-system. Self-directed learning cannot lead to credits and it is totally outside the formal educational system. These two circumstances mean that there are difficulties in arguing for the involvement of the self-directed learner in distance education.

But this does not cause us to throw away knowledge about self-directed learning. A good and fruitful alternative can be to turn our attention to an analysis which tries to explore how today's knowledge about self-directed learning can help us to develop distance education in a useful direction, both for the students and the organizations.

There should be very good possibilities of using self-directed learning to get valid and reliable knowledge about the learners' own methods of planning their learning, the learning-process and the outcomes. This form of education can be said to be more pure than learning in organized education. There is also a fruitful possibility here of studying the concept of experience in learning, as the self-directed learners' strategy for the learning project is based on their own level of experience. It is therefore, important to find out, both in distance education and adult education in general, how people want to organize and control their learning activities and how important contact is in the learning process.

For all learning and education it is of utmost importance to find out what it is that influences the learning process, both positively and negatively. In distance education there seems to be a deep conflict between two divergent conceptions of the nature of distance learning. One standpoint views the student as an independent or autonomous learner, who chooses this form of education because of specific individual characteristics and, because of these characteristics has every chance of succeeding with his/her studies. The other standpoint represents an interactionist model, where the individual is seen in a wider context, and the explanations for study behaviour are sought

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both in the individual and in the environment. These two standpoints can also be said to represent two different organizing models for distance education, - a strongly centralized model, often based on the use of non-human media, and a more decentralized model, where the contact between student and teacher is central. The research in this field is in its early beginning, but some findings strongly support the latter standpoint that human contact is a positive and important part of the learning process (see eg Willén 1981, 1984).

To sum up there seem to be so many differences in study motives, learning strategies and the study process between self-directed learners and organized adult learners, that we must be very careful, when trying to find new ways of reaching self-directed learners. Brookfield (1982) has also shown us that self-directed learners were not interested in learning organized by the ordinary adult education systems; there is no interest by these persons of taking a course as part of their learning projects. However, according to Brookfield (1982), this independence is not always recognised: "Some adult educators would no doubt feel threatened by the revelation of a substantial amount of independent adult learning within their communities and would seek to annex it into their institutions. Others would simply refuse to acknowledge that learning activities characterised by such initiative and persistence could take place in the absence of professional supervision" (ibid p 26).

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Report series in English from the Department of Education, Uppsala University.

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ISBN 91-85250-98-8
ISSN 0348-3649

Uppsala universitet
Reprocentralen HSC
Uppsala 1985